Netherlands

ECONOMY. Growth in the Dutch economy was among the European leaders for much of the latter half of the 1990s. However, growth has leveled off in recent months, as the drag from Germany and France has dampened the Dutch economy. Nonetheless, as recovery accelerates in the Euro zone, growth will again return to the Netherlands. Unlike its larger neighbors, inflation has caused some concern, increasing more quickly than elsewhere in the Euro zone. However, income gains continue to outpace inflation and unemployment, already among the lowest in Europe, continues to fall.

EXCHANGE RATE. Transition to the Euro has been relatively uneventful. However, because of the interconnected relationship between the large European economies and their inability to sustain growth in the wake of a US slowdown, the Euro has struggled against the U.S. dollar. Nonetheless, the Euro has recently risen to near parity with the U.S. dollar. If the equitable exchange rate is sustained, demand for U.S. travel should increase as the relative cost of travel to the U.S. declines.

LANGUAGE RESOURCES. A large majority of Dutch travelers to the U.S. are repeat visitors from the upper income and education groups. English is widely spoken among these groups. In addition, most Dutch travelers also have some fluency with either French or German, so materials for these markets can also be used in the Netherlands.

TECHNOLOGY APTITUDE. After Scandinavia, consumers from the Netherlands are the leading users of the Internet in Europe, perhaps reflecting the comfort of many users with English. Household computer use is also among the highest in Europe and the Netherlands continues to adopt new technology quickly.

SEASONS & SEGMENTS. Dutch travelers are predominantly warm weather travelers, even during the winter months. The most common activities are sun & beach activities. However, a large number of Dutch travelers pursue mountain activities. There is also an undeveloped ski market in the Netherlands that is just beginning to attract the attention of many ski destinations. Among Dutch travelers to Utah, an overwhelming majority travel to the national parks. Other common activities include touring and sightseeing. A growing number of Dutch travelers pursue travel independently, renting a car or RV and exploring the U.S. on their own or as part of a small group of family or friends.

HISTORIC VISITATION. The Netherlands has been one of the fastest growing markets for travel to the U.S., growing in each year during the 1990s except for a small decline in 1994. The U.S. remains the preferred long-haul destination, although increasing pressure from competitive destinations such as South Africa, Canada, Southeast Asia, Latin America and the Caribbean offer travelers increasingly more choices. Growth in Dutch visitation to Utah increased during the early 1990s, but has leveled off since declining slightly in 1997.

SOCIAL & POLITICAL FACTORS. Demand for travel to the U.S. was significantly affected by the terrorist attacks on September 11th. Similar to other European markets, many Dutch travelers replaced short trips to the U.S. with regional trips within Europe.

OLYMPIC INTEREST. The Netherlands are passionate followers of several Winter Olympic sports, most notably speed skating. The 8 medals won by Olympic participants in Salt Lake City bring the total number of Winter Olympic medals for the Netherlands to 69. Metered reports from television stations in the Netherlands suggests coverage of the Games was extensive, attracting nearly 14 million viewers for eight and a half hours each. For many viewers, Olympic coverage provided their first look at Utah as a vacation destination, with extensive reporting on Salt Lake City as a growing American city offering many recreational activities.

DISTRIBUTION INFRASTRUCTURE. A very high percentage of Dutch travelers obtain information via travel agencies, although a smaller number actually purchase packages. Although Salt Lake City offers no direct flights from the Netherlands, access is relatively easy through many East Coast gateways and numerous carriers with service to Amsterdam.

UTAH VISITORS FROM THE NETHERLANDS SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)	
Averare Age (mean)	42.0
18-34 Years	38%
35-54 Years	45%
55+ Years	17%

HOUSEHOLD INCOME ($US)	
Average HH Income	$62,300
< $40,000	27%
$40,000 - $80,000	44%
$80,000 - $120,000	28%
$120,000+	2%

PARTY COMPOSITION	
Avg. Travel Party (mean)	1.9
Family/Relatives	44%
Spouse	33%
Friends	12%
Traveling Alone	11%
Business Associates	5%
Tour Group	2%
Adults Only	95%
Adults and Children	6%

GENDER	
Men	61%
Women	40%

FREQUENT TRAVELERS	
Repeat Visitor to the U.S.	66%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	3.0
1 Trip	39%
2 - 5 Trips	53%
5+ Trips	8%

OTHER DESTINATIONS VISITED	
# of States Visited	3.8
# of Destinations Visited	5.7
California	68%
San Francisco	32%
Los Angeles	32%
Yosemite N.P.	18%
Riverside/San Bernadino	12%
Death Valley N.P.	10%
Nevada	56%
Las Vegas	45%
Arizona	56%
Grand Canyon N.P.	29%
Colorado	24%
Denver	13%
Wyoming	12%
Yellowstone N.P.	9%
New York	11%
New York City	11%

TRAVEL PATTERNS

ADVANCE TRIP DECISION	
Advance Trip Decision	129 Days
Advance Air Reservations	85 Days
Use of Pre-Booked Lodging	71%

USE OF PACKAGES	
YES	32%
Air/Rental Car	20%
Air/Lodging	19%
Air/Lodging/Tour	10%
Guided Tour	7%
Air/Lodging/Rental Car	2%
Advance Package Booking	121 Days
# of Nights Pre-paid as Part of a Package	14.0

INFORMATION SOURCES	
Travel Agency	80%
Travel Guides	27%
Friends/Relatives	21%
Personal Computer	16%
Tour Company	7%
Newspapers/Magazines	6%
Airlines Directly	5%
State/City Travel Office	4%
Other	11%

ACCOMMODATIONS	
Hotel/Motel	72%
Private Home	12%
Other	21%

TRANSPORTATION IN U.S.	
Rented Auto	56%
Taxi/Cab/Limousine	36%
Airlines in U.S.	28%
City Subway/Tram/Bus	19%
Railroad Between Cities	18%
Company or Private Auto	15%
Bus Between Cities	11%
Motor Home/Camper	5%

LENGTH OF STAY	
# of Nights In UT (mean)	4.4
# of Nights in US (mean)	22.7

UTAH DESTINATIONS VISITED	
Bryce Canyon N.P.	27%
Salt Lake City	22%
Zion N.P.	14%
Monument Valley	6%
Glen Canyon	4%

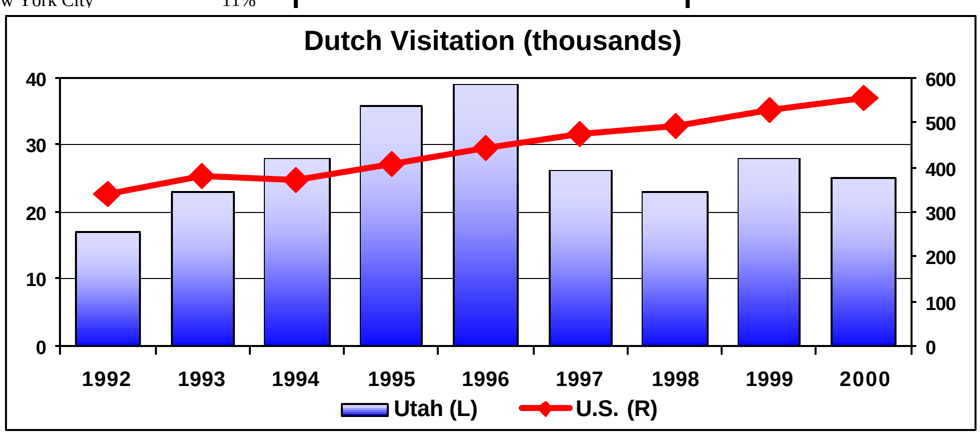
PURPOSE/ACTIVITIES

PURPOSE OF TRIP	
Leisure & VFR	89%
Leisure/Rec./Holidays	79%
Visit Friends/Relatives	10%
Business & Convention	11%
Business/Professional	7%
Convention/Conference	3%
Study/Teaching	1%

PORT OF ENTRY	
Los Angeles	23%
Washington D.C.	15%
San Francisco	10%
Minneapolis/St. Paul	9%
New York	8%

LEISURE ACTIVITIES	
Visit National Parks	91%
Shopping	89%
Dining in Restaurants	88%
Touring Countryside	86%
Sightseeing in Cities	80%
Visit Historic Places	67%
Visit Small Towns	62%
Casinos/Gambling	48%
Amusement/Theme Parks	45%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	43%
Art Gallery/Museum	35%
Camping/Hiking	33%
Guided Tours	25%
Water Sports/Sunbathing	25%
Concert/Play/Musical	20%
Golfing/Tennis	9%
Environ./Eco Excursions	8%
Nightclubs/Dancing	8%
Attend Sports Event	5%
Snow Skiing	5%
Ethnic Heritage Sites	5%
Cruises	2%
Ranch Vacations	1%
Hunting/Fishing	--

PERFORMANCE	
Total Int'l. Visitation (000s)	28
Market Share	5.4%
Avg. Spending Per-Visitor-Per-Day (mean)	$74



SOURCE: OTTI, U.S. Department of Commerce